



**adex**  
Benchmark 2017

AdEx Benchmark  
Study 2017

Released 23 May 2018  
Digital Advertising in Europe

#adexbenchmark

**iab**•europe

 IHS Markit™

The data and charts shown in this report cannot be used without the expressed permission of IAB Europe and IHS Markit

#adexbenchmark

adex  
Benchmark 2017

iab●europe



IHS Markit™

**adex**  
Benchmark 2017

**#adexbenchmark**

# About the study

# Data for 27 markets in Europe

- Austria
- Belarus
- Belgium
- Bulgaria
- Czech Republic
- Croatia
- Denmark
- Finland
- France
- Germany
- Greece
- Hungary
- Ireland
- Italy
- Netherlands
- Norway
- Poland
- Russia
- Romania
- Serbia
- Slovakia
- Slovenia
- Spain
- Sweden
- Switzerland
- Turkey
- UK



**adex**  
Benchmark 2017

**#adexbenchmark**

**Big picture**

The size of the digital advertising market in Europe (2017)

€48.0bn  
(+13.2%)

#adexbenchmark

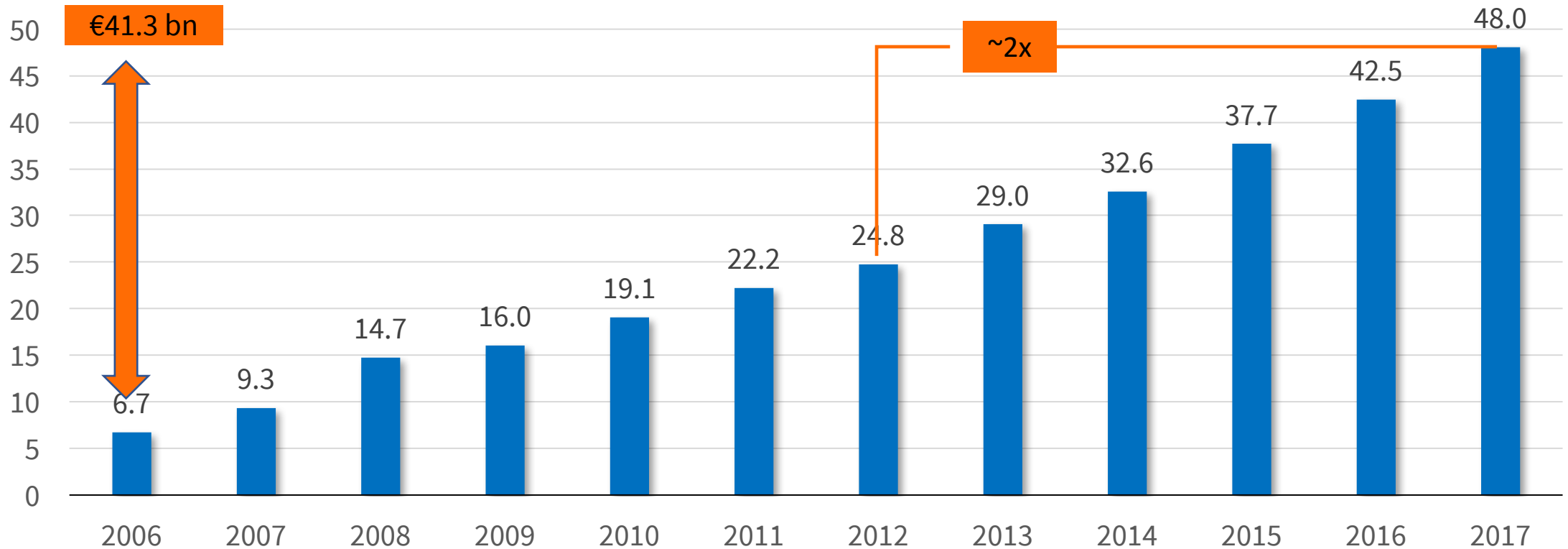
adex  
Benchmark 2017

iab.europe

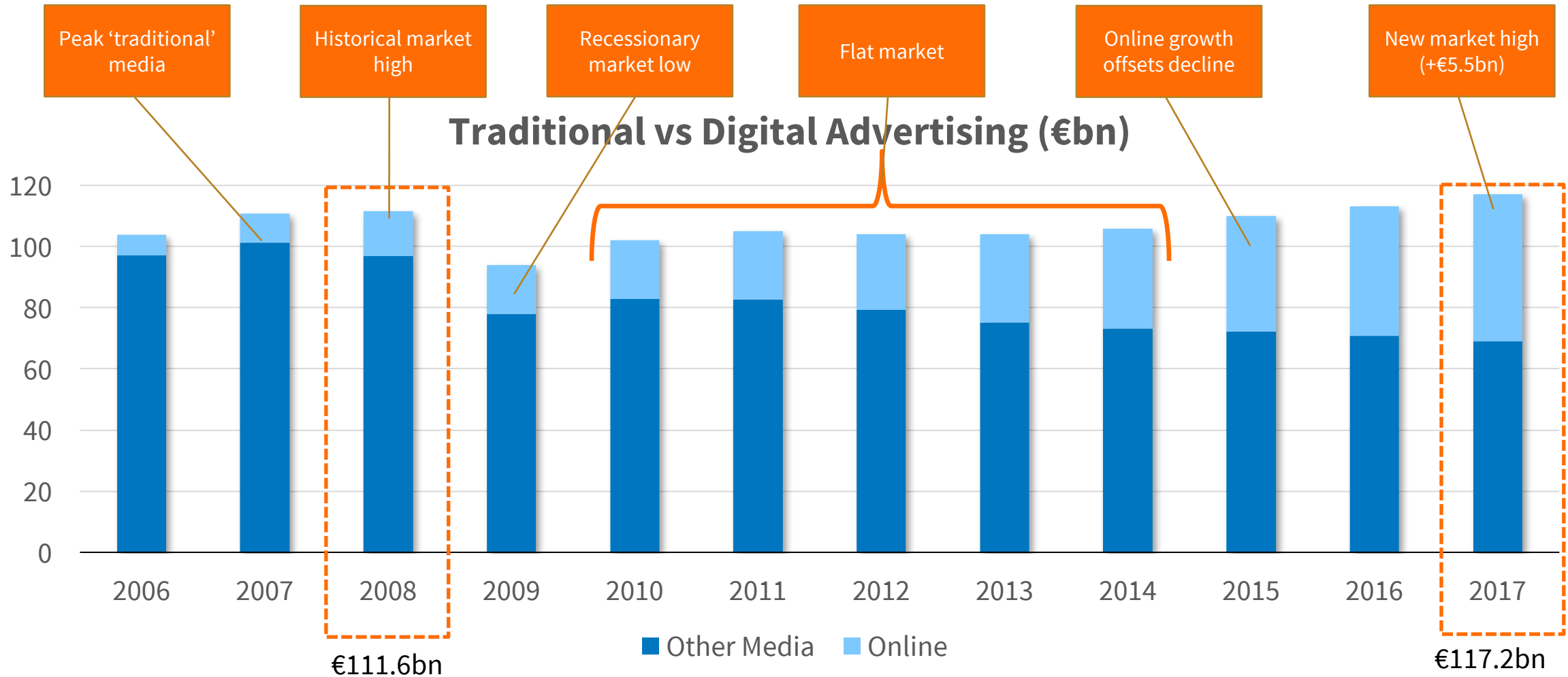
 IHS Markit™

€41.3bn net addition in 12 years, market doubled in last 5 years

### Total digital ad spend: historical perspective



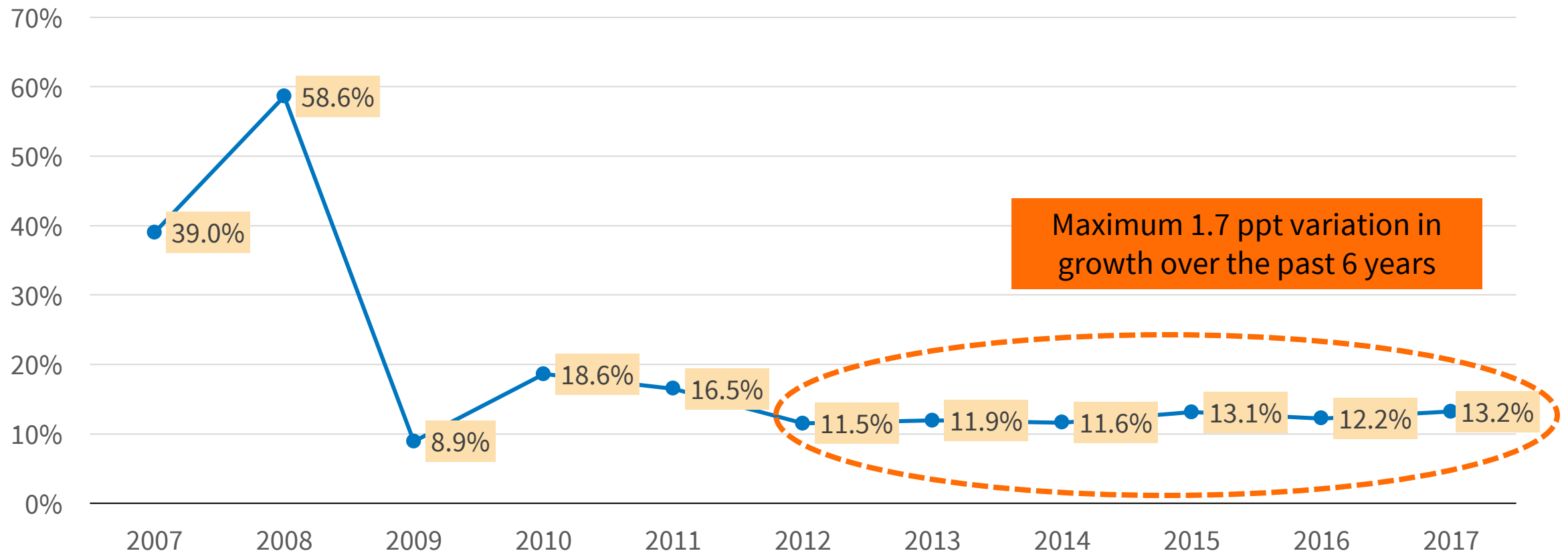
# Digital offsets losses of traditional media, establishing a new all-time advertising market high





“Plus ça change, plus c'est la même chose”: consistency in growth rates over past six years despite fundamental market restructure

## Historical digital advertising market growth



Maximum 1.7 ppt variation in growth over the past 6 years

# adex

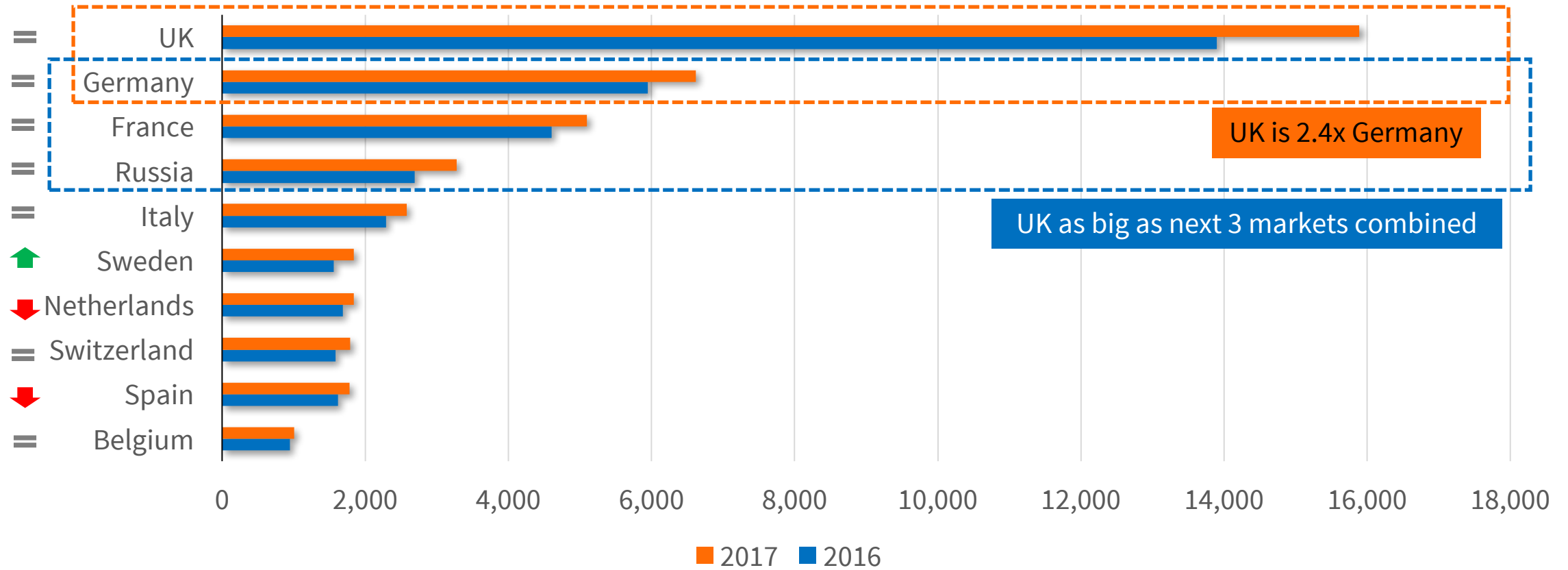
Benchmark 2017

#adexbenchmark

# Markets

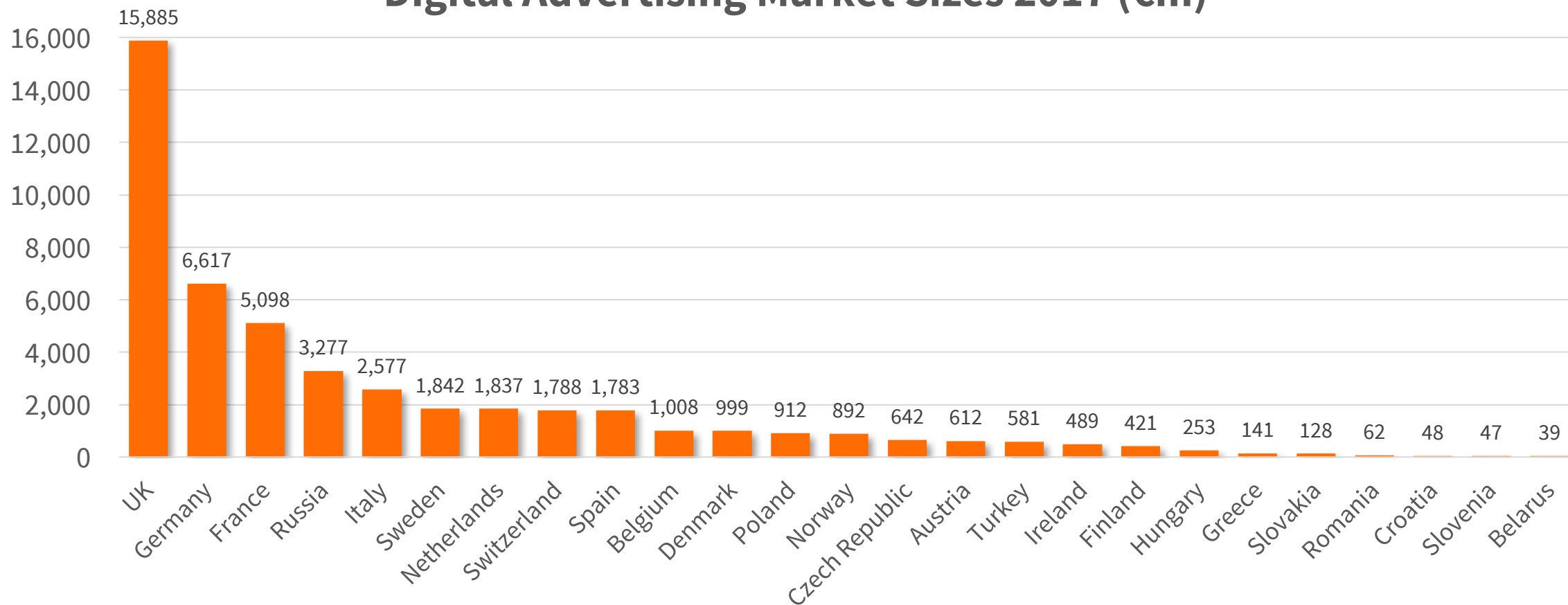
# Top 5 ranking stable, Sweden moves up, UK maintains lead

## Top 10 Markets Ranked



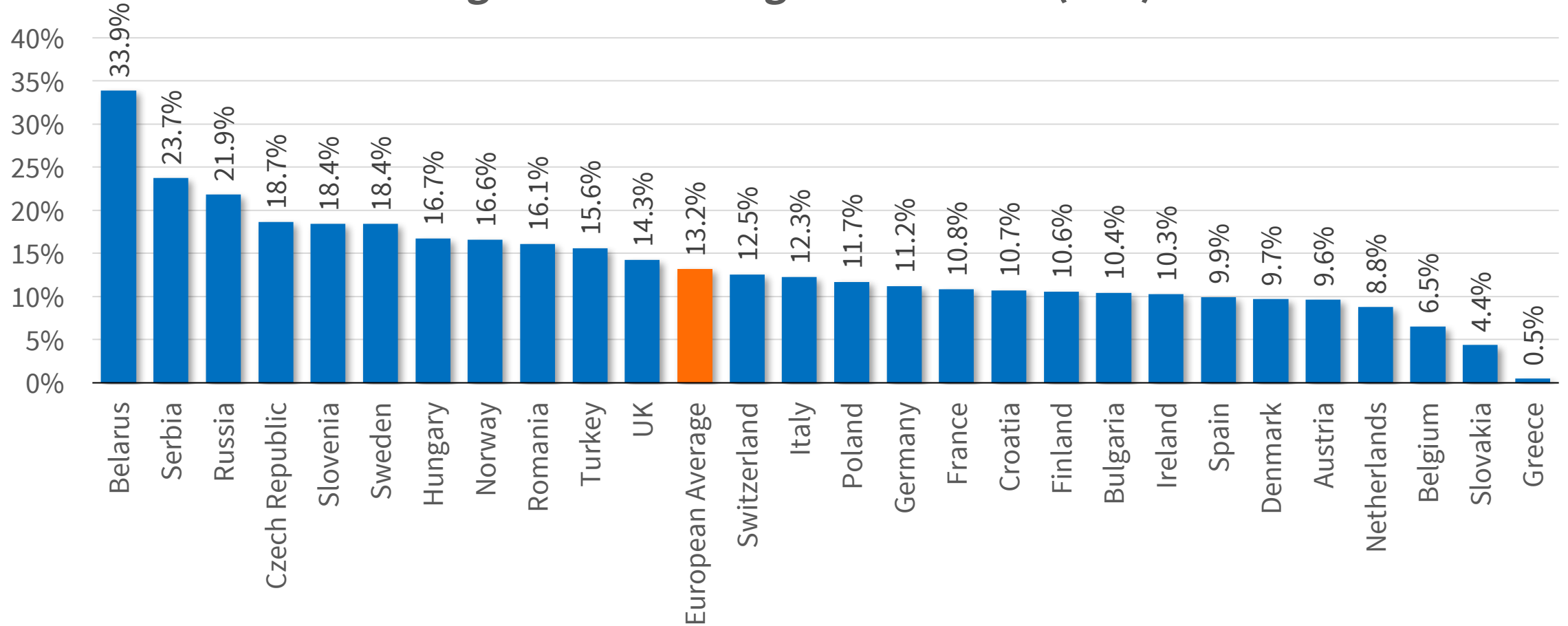
# UK more than twice as large as Germany

## Digital Advertising Market Sizes 2017 (€m)

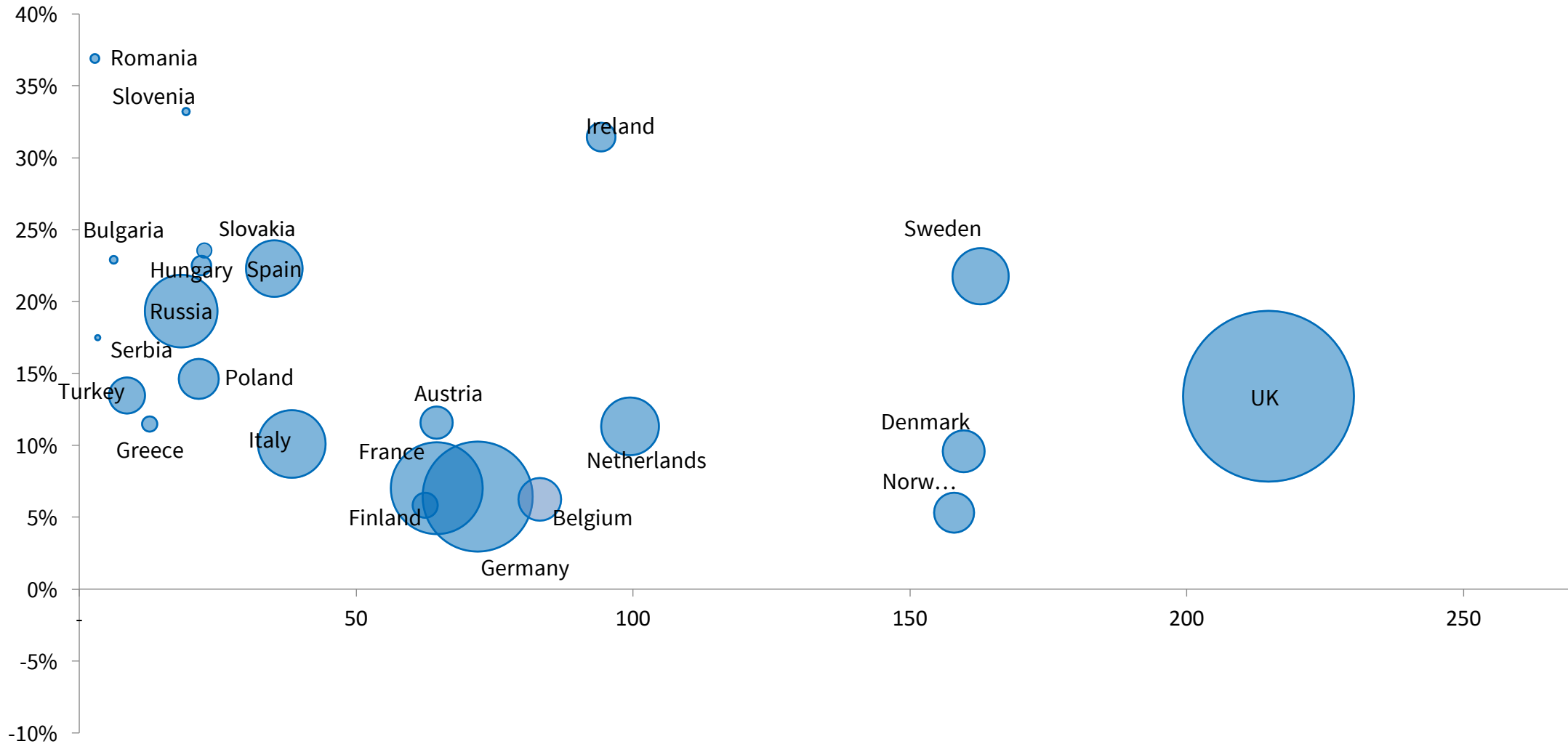


# Growth driven by CEE, Nordics, UK

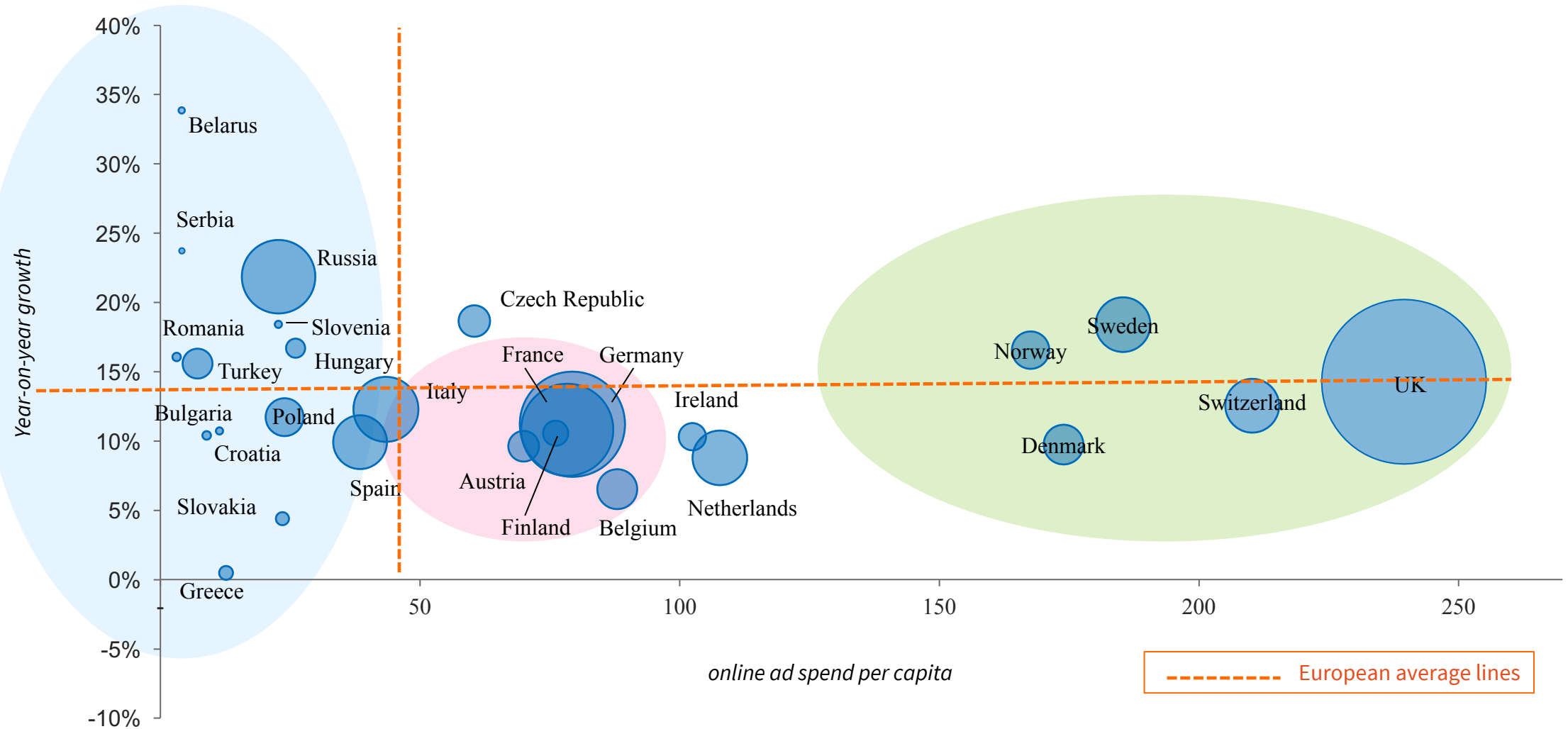
## Digital Advertising Growth 2017 (YoY)



# A look back at 2016...



# ...reveals a 3-tiered Europe in 2017



**adex**  
Benchmark 2017

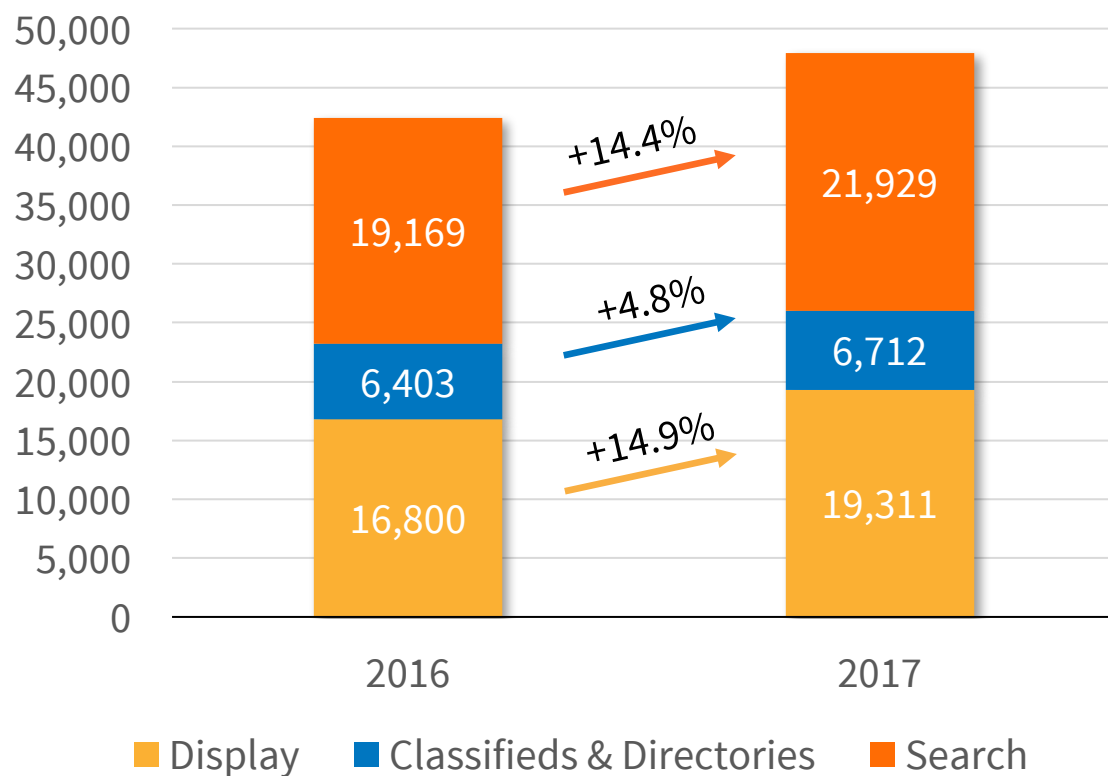
**#adexbenchmark**

# Formats

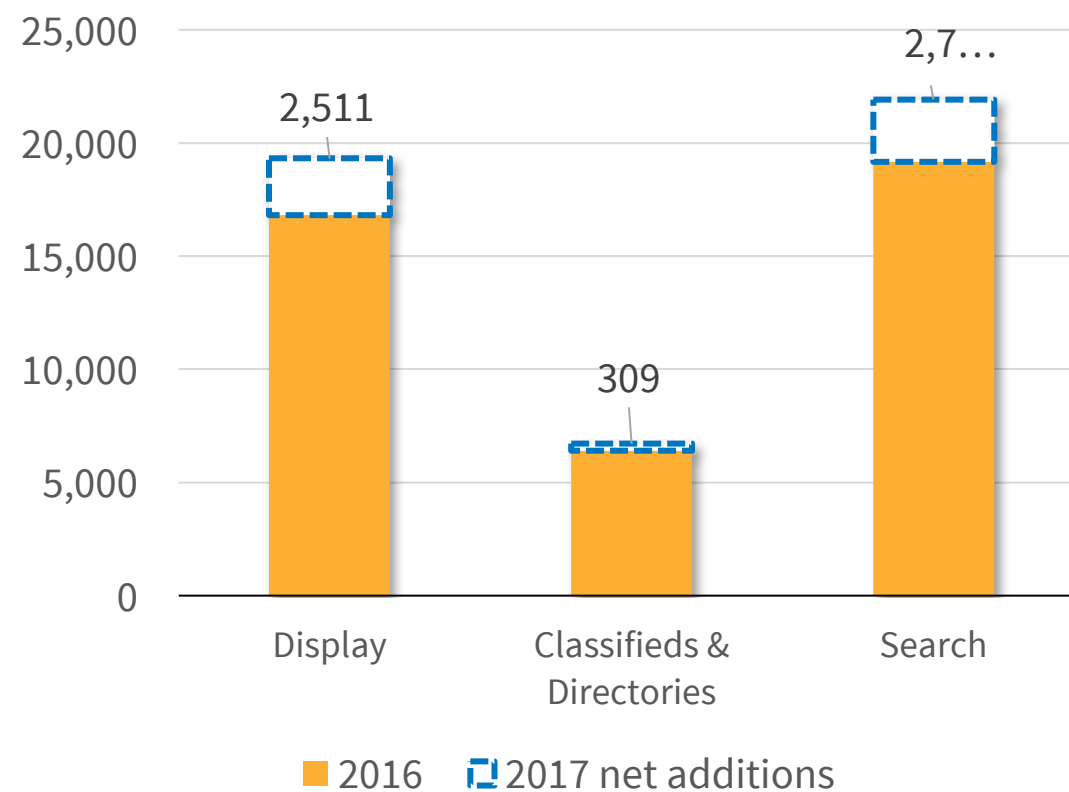


€5.5bn added in total

### Digital Advertising Spend by Format (€m)\*

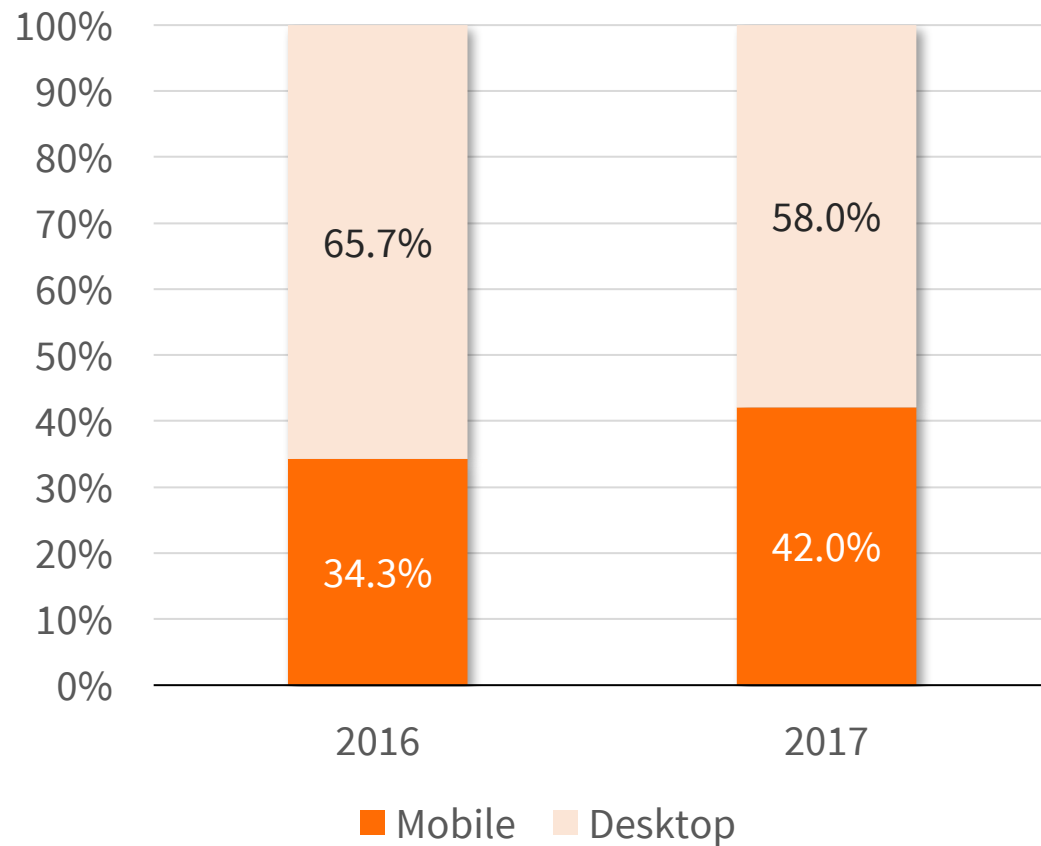


### Net additions 2017 (€m)

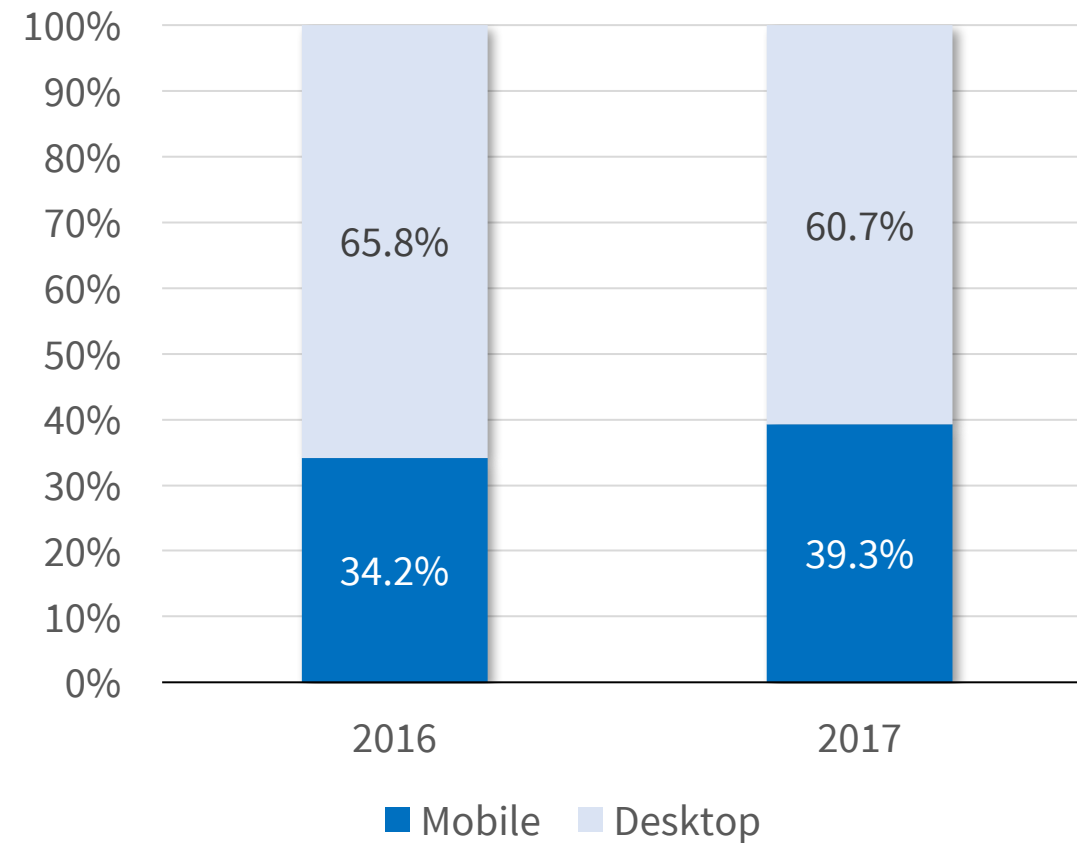


# 40% of digital ad spend is on mobile

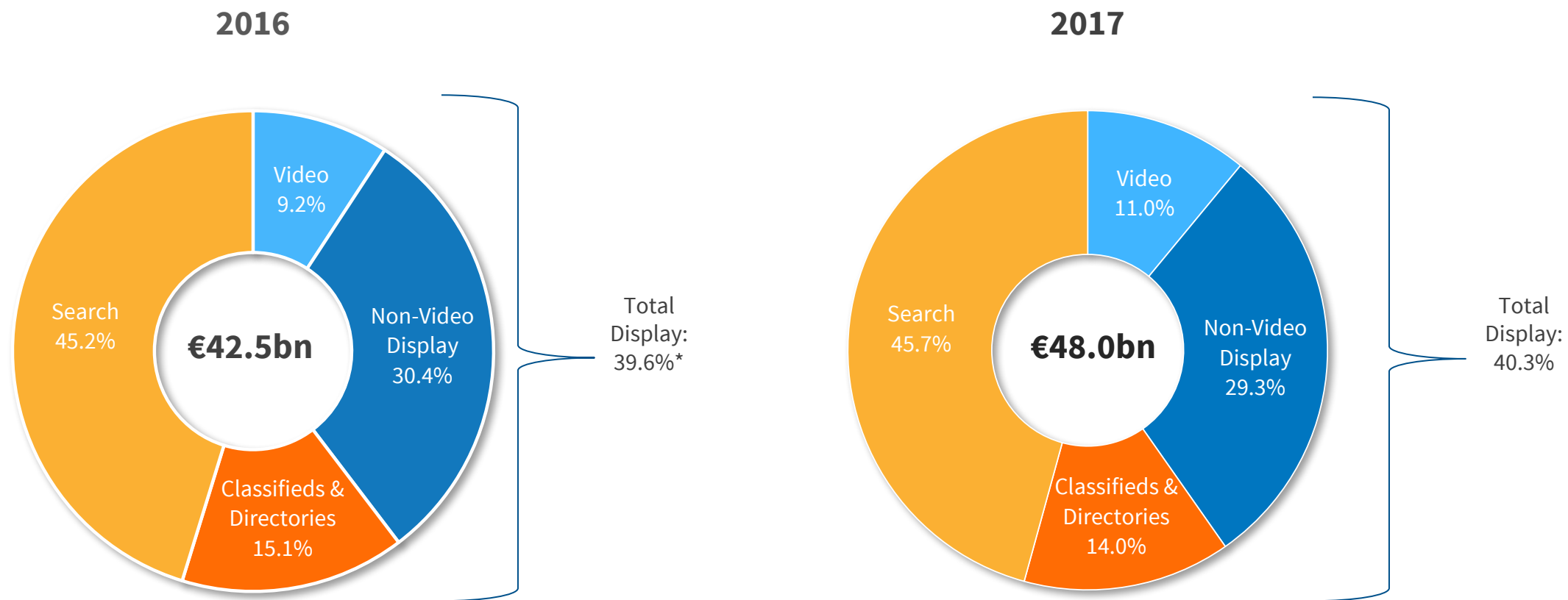
## Display



## Search



# Expansion of video drives share gains of total display

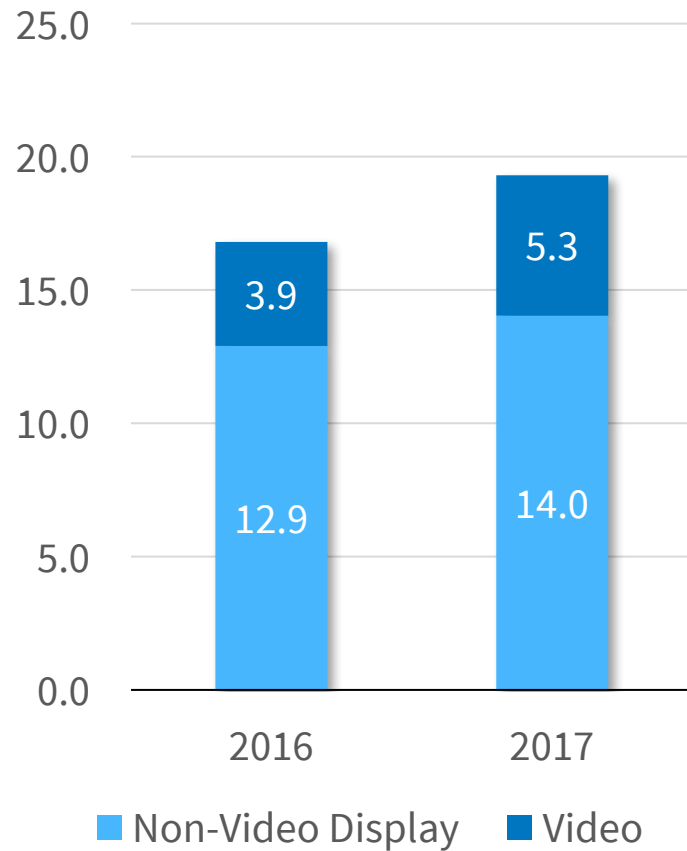


■ Video ■ Non-Video Display ■ Classifieds & Directories ■ Search

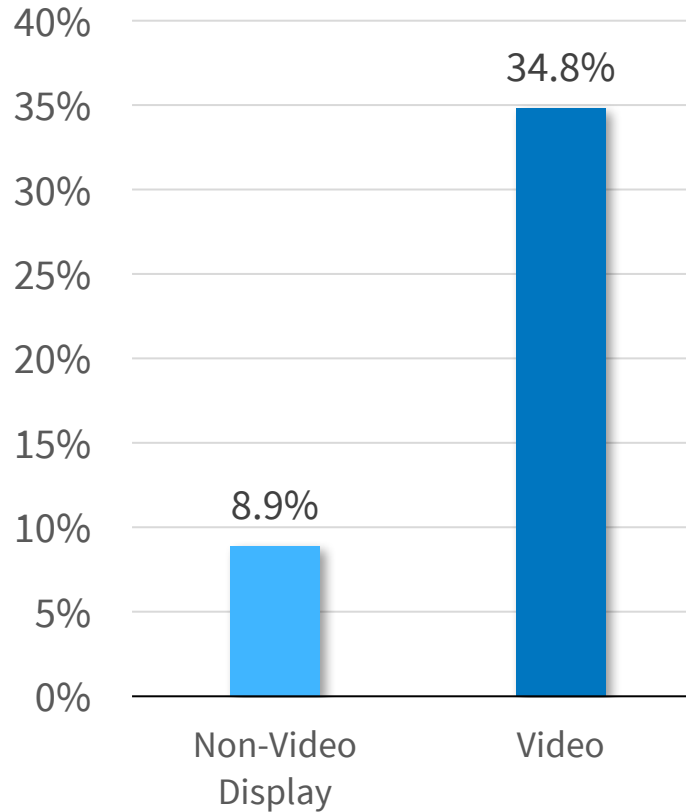
■ Video ■ Non-Video Display ■ Classifieds & Directories ■ Search

# Video reaches 27% of display, growing 4x non-video display

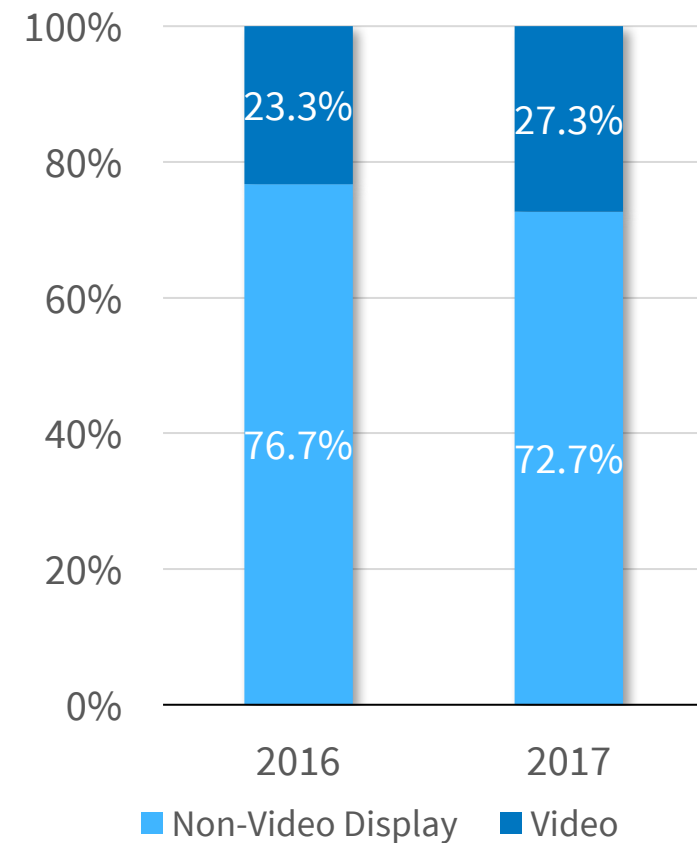
### Display by Format (€bn)



### 2017 Growth

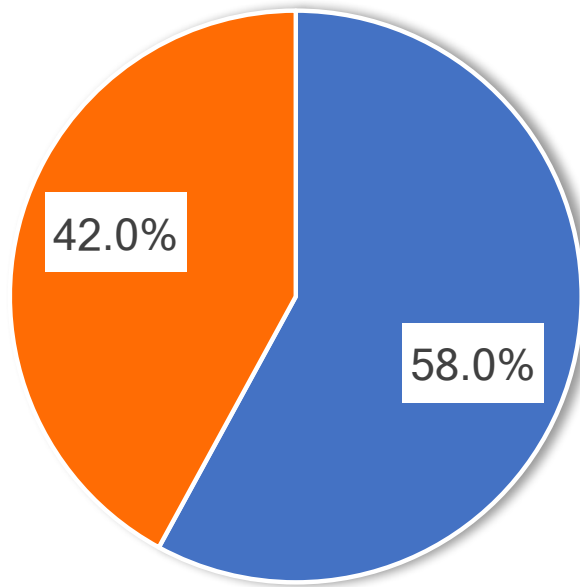


### Share of Display Total



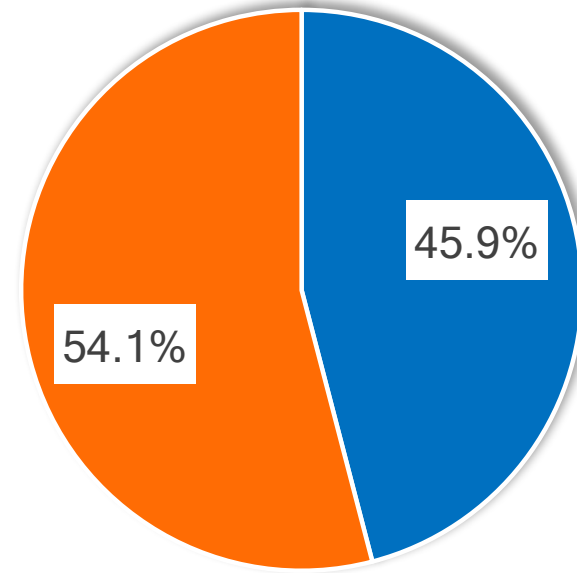
# Out-Stream (+73.4% YoY) overtakes In-Stream Video (+6.9% YoY)

2016: Share of Digital Video Ad Spend



■ In-Stream ■ Out-Stream\*

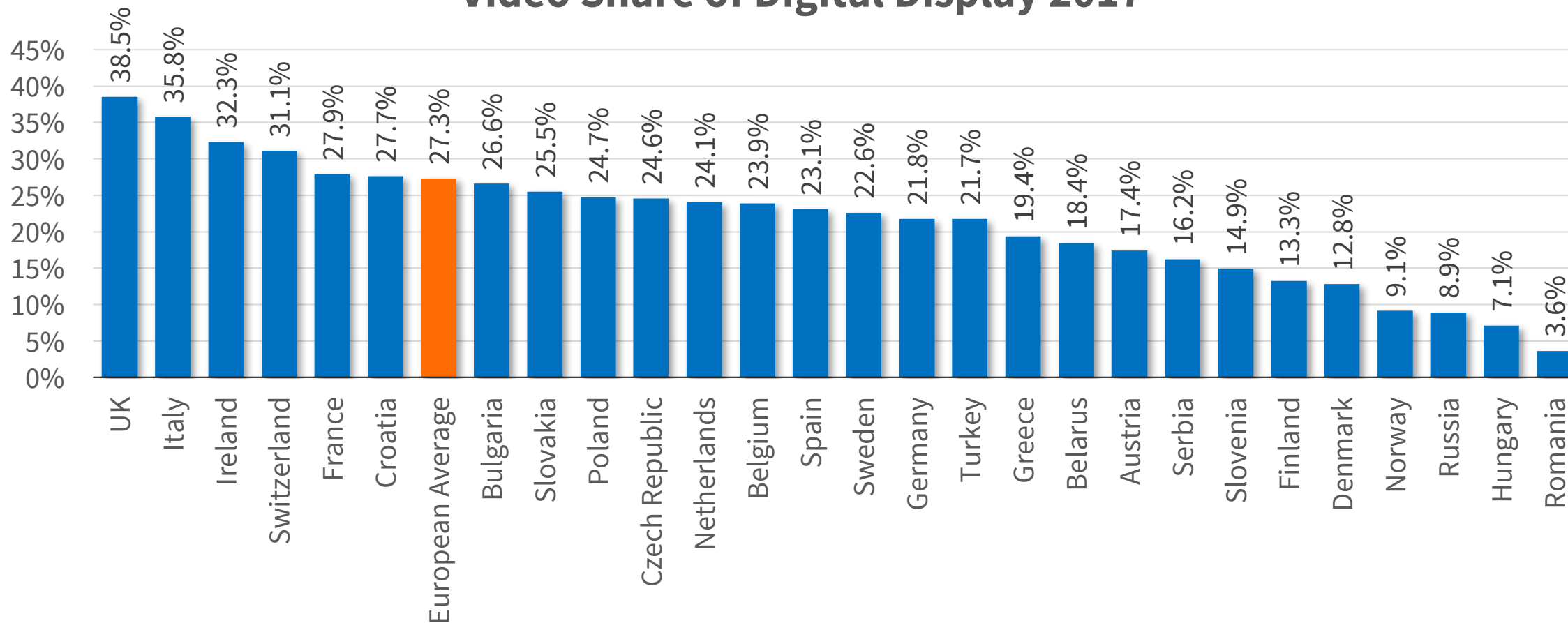
2017: Share of Digital Video Ad Spend



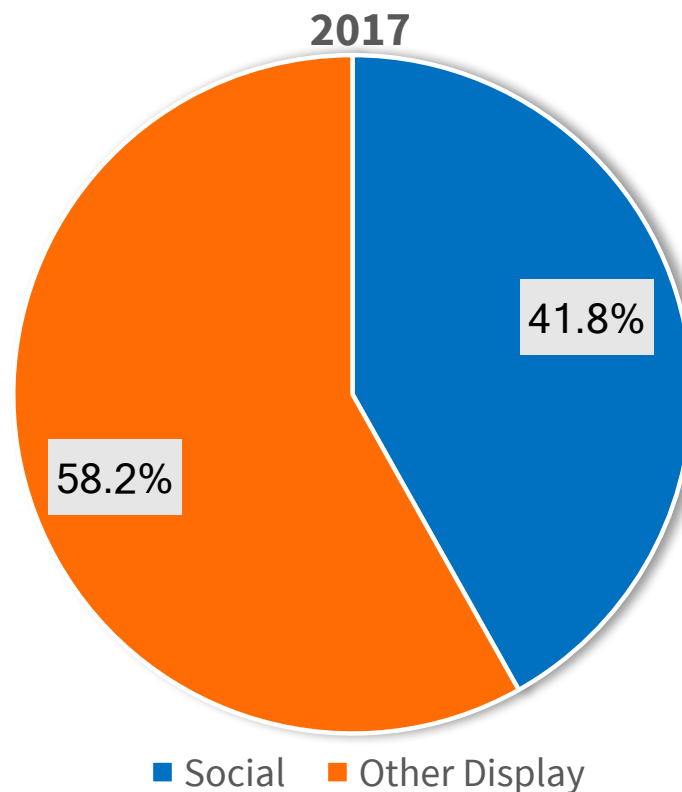
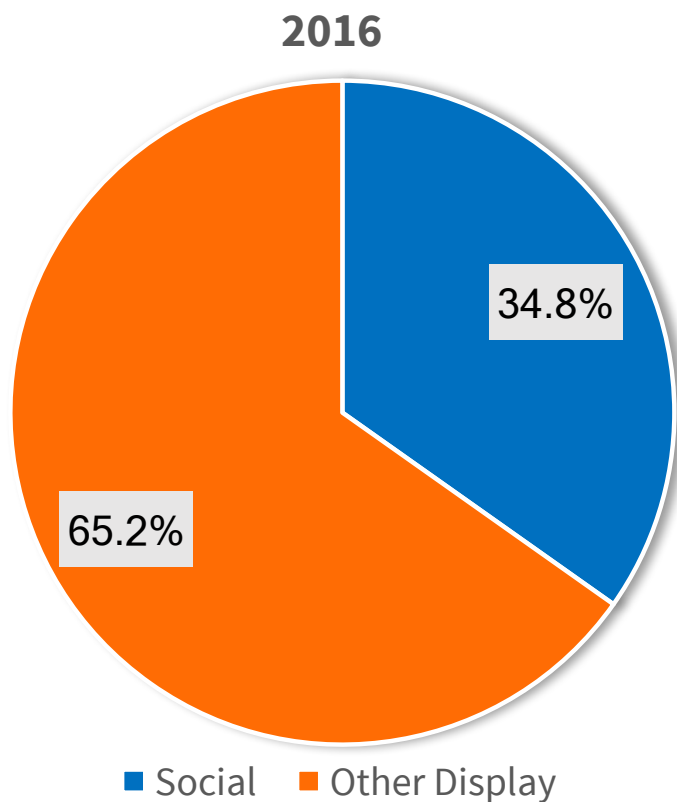
■ In-Stream ■ Out-Stream\*

# Video is more than 1/4 of digital display advertising

## Video Share of Digital Display 2017

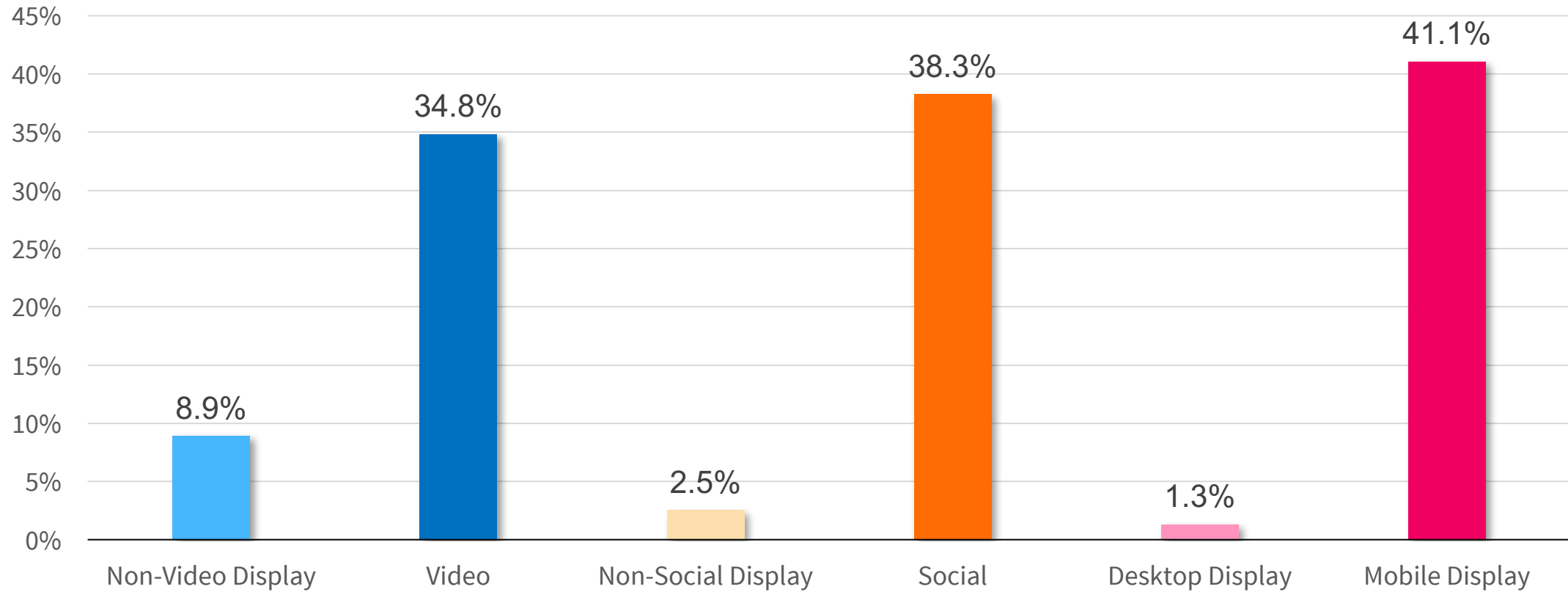


# Social added 7ppt to its share of display in 2017



# The trinity of SoMoVi: concentration of growth

## 2017: Display Growth





# Contact

Alison Fennah – [fennah@iabeurope.eu](mailto:fennah@iabeurope.eu)

Marie-Clare Puffett – [puffett@iabeurope.eu](mailto:puffett@iabeurope.eu)

Daniel Knapp – [daniel.knapp@ihsmarkit.com](mailto:daniel.knapp@ihsmarkit.com)

## Connect with us:



@IABEurope

@IHS4Tech



IAB Europe

[www.iabeurope.eu](http://www.iabeurope.eu)

[www.technology.ihs.com](http://www.technology.ihs.com)

**#adexbenchmark**

**adex**  
Benchmark 2017

**iab**•europe



IHS Markit™